Food, community and wellbeing: An exploration of Harvest Launceston farmers' market

INDUSTRY REPORT

Dr Maria Belen Yanotti, University of Tasmania

Dr Laura Ripoll Gonzalez, Griffith University, Queensland

utas.edu.au

Image courtesy of Harvest Launceston

Page intentionally left blank

EXECUTIVE SUMMARY

This report presents the findings of the second iteration of a longitudinal study exploring the role of food in the community building setting of a local farmers' market. Harvest Launceston farmers' market is held each week on Saturday mornings in the City of Launceston, Tasmania. This study adopted a mixed-methods approach, combining quantitative and qualitative data through a series of on-site paper surveys collected during four consecutive editions of the market in 2019 in April and May.

REPORT HIGHLIGHTS: MARKET ATTENDEES

Demographics:

Harvest Launceston typical market attendees are younger, more educated and manage higher household incomes than the typical Tasmanian. Most market attendees were residents of Launceston and surrounding areas -- however, 17.8% reported coming from interstate and internationally. Most visitors were recorded on the weekend that there were no major events in the Launceston surroundings.

Motivations:

Most participants attended Harvest Launceston as a social (or touristic) weekend activity and not a mere shopping outing. Participants primarily bought food and drinks to be consumed at the market. Participants' main motivations included: access to fresh and local produce, experience local food, and meet people/socialise.

Attendees' opportunity cost on Saturday mornings was mainly related to household activities, but also cultural activities or events, sports and outdoor-related activities or socializing -- 48% of the opportunity cost of being at the farmers' market related to wellbeing. Most participants (70%) attended other markets besides Harvest Launceston, primarily local and state markets, in particular Evandale market, Salamanca and Farmgate markets in Hobart, but also in markets in Sydney, Melbourne and Brisbane.

Expenditure:

Market patrons mainly purchased food and drinks to consume at the market ($21 spent on average each Saturday), as well as primary produce ($29 spent on average), value-added products[*] ($12 spent on average). Some expenses were related to entertainment ($1.2 spent on average) and travel expenditure ($3 spent on average). The overall average expenditure on a Saturday was $60 -- half of the sample reported a having spent $50.

Measuring the value of culture around food (contingent valuation):

We observed a strong link between food and community building:

- More than 50% of respondents were willing to pay a surcharge between 1-20% for their groceries and food in order to connect with the community. 8% of respondents were willing to pay over 50% surcharge if they were enjoying the connection with their community.
- Over a third reported to be willing to pay between 11-20% above average competitive prices for fresh produce and to support local farmers.
- 60% were willing to pay a surcharge between 11-75% to support sustainable practices.

Participants' willingness to pay was mainly determined by their income level. Some participants also mentioned that the market was relatively more expensive than other alternatives.

[*] By primary produce we understand farmed products, such as fresh vegetables, fruits and meats, whereas examples of value-added produce would be jams, wines, etc.

Perceptions

Participants reported positive perceptions towards farmers' markets and Harvest Launceston. The majority highlighted the availability, variety, freshness and high quality of produce at Harvest Launceston. They also agreed that farmers' markets contribute to Tasmania's agritourism industry and that Harvest Launceston contributes to cultural diversity and offers opportunities for community engagement. Many reported they enjoyed the atmosphere, environment, vibe and feel of the market that they described as friendly, welcoming, engaging, diverse, inclusive and vibrant.

REPORT HIGHLIGHTS: MARKET STALLHOLDERS

Demographics, business configuration and revenue

Business owners trading in the farmers' market were mainly men between 55-64 years of age; a third of them reported to have completed tertiary education, and to have been in business for 5 years on average. An additional third reported to attend the market since the markets' inception. Businesses employed on average 2 staff, with combinations of full-time and casual employees; however, 20% of businesses did not hire employees, and were run by the owners. All stallholders were Tasmanian businesses, most located in the Launceston vicinity. Approximate daily (per Saturday) market revenue was on average AUD $881, daily costs of AUD $278, and average profits of AUD $623 per Saturday.

Motivations

Stallholders stated that the market 'provides a possibility to educate people about local food and produce' and that market participation 'brings profits to their business' (89%). Over 85% agreed that the market 'is a great environment to connect with the local community around food', 'provides an alternative avenue to sell fresh, local, seasonal and nutritional food', and `is a good environment to build and grow a brand'. 83% believed the market 'creates a culture of collaboration and mutual support amongst vendors'.

Amongst their reasons to join the Harvest Launceston community, 42% reported marketing or new costumer demographic as their main reason to join the market. Testing products (23%) and developing new sales outlets (16%) were other main reasons. Further reasons to join included a community of support and friendship (32%), a good return on investment (26%).

Many stallholders highlighted the role of the market in the creation of community and culture around food (following attendees' perceptions), as 'it is a great environment to connect with the local community around food'. Among their favourite aspects of the market, stallholders highlighted: Harvest Launceston's reliable customer base (55%) and interactions with consumers; the support by other stallholders and the market's management (13%); the opportunity to sell and promote their produce (13%); and the local feel (10%). Stallholders complained about the market's amenities, such as parking and toilets (16%), and issues related to the management and market policies (10%). Complaints on amenities reflected current pressures the market faces with its reduced area of operation. The fact that some (20%) stallholders did not have anything to complain about could be considered as a reflection of their overall satisfaction.

Perceptions

An exploration of stallholders' perceptions of the market revealed that all participant stallholders agreed that the market `offers a variety of produce, products and food and drinks'. Most participants agreed that 'produce in Harvest Launceston is of high quality'; that 'farmers' markets contribute to availability of fresh and local food' (97.1%); that 'Harvest Launceston offers opportunities for community engagement'; and 'farmers' markets contribute to cultural diversity'. Some 89% agreed that 'produce and food at Harvest Launceston are reasonably priced'.

With regards to farmers' markets role in bringing a community together, stallholders reported that they believed the market `contributes to the local economy' and that it `promotes regional and local agriculture and supports local farmers' (94%); and it 'provides a one-stop shop to access fresh, local, seasonal and nutritional food' (91%). They recognised its role in that it 'Acts as an environment to learn about and connect through food' (86%); 'Adds to the livability of the city' (83%) it 'Supports community, local groups and other initiatives' (80%); 'Encourages community wellbeing and improved health', 'revitalizes public spaces' (66%). The market provides an opportunity for education about food provenance, and 'produce seasonality' as well as 'how produce is made' and, in particular, 'the resources involved in food production'. This highlights the 'community around food and sharing' (68%), and 'the tradition about produce' and 'recipes' (57%).

The farmers' market offers a great platform for local farmers and businesses to offer their products and grow their business. It also offers a common place for the community to access fresh and local produce, support local farmers and businesses and enact sustainable practices. Market attendees are willing to pay above competitive prices for these features. Importantly, it clearly becomes a space for community to meet and interact around food purchase and consumption and learn from each other. It provides a space for leisure and socialising, and in that context it becomes a touristic attraction. All these features have important implications for community health, wellbeing and development. However, these social returns currently mainly benefit higher-income individuals in the community given the typical characteristics of market attendees and would bring higher benefits if extended to all the local community.

A note on the present COVID-19 pandemic effects on our food systems

The COVID-19 pandemic has brought to the spotlight the many crises our food systems are currently experiencing and has emphasised the potential consequences that a lack of access to fresh, quality and organic food has on people's health and wellbeing.[1] Farmers' markets support a more sustainable production of food. Farmers' markets educate consumers on seasonal and optimal nutrition, regenerative agricultural practices, healthy diets, waste management and human connection through food. From an economic perspective, farmers' markets support small to medium local producers and increase diversity. Our food systems are the founding pillars of health and wellbeing in our communities.

In addition, food is a driver of community building and has an undeniable cultural significance. Food brings communities together. The social distancing regulations imposed by governments due to the COVID-19 health crisis are restricting social interactions within the community. Many markets around the country, including Harvest Launceston, had to close temporarily following governments' regulation. The importance of community interaction and support has been made more evident.

The results of this survey suggest that farmers' markets engage with a community of like-minded farmers, supported by a loyal customer-base and that, together, could act as a political actor or lobby advocating for alternative understandings of sustainable local and regional development through sustainable food systems that balance economic, social and environmental aspects.

The social, economic, and wellbeing benefits of farmers' markets need to be inclusive and extend to all the community. Arguably those members of the community with lower education and poorer health (often associated with lower income) would benefit the most. With the appropriate government policies and subsidies, we believe that farmers' markets could assist in the provision of fresh and highly nutritional food, as well as food education, to lower socio-economic sections of our urban and regional societies.

[1] For example, in Australia, were most food production responds to the requirements and price wars of a long establish supermarket duopoly, 40% of fresh food production is currently wasted.

INTRODUCTION

This report provides insights into the role of food in building community through an exploration of the perceived benefits of a farmers' market. The project studies the perception of the social, cultural, economic, and environmental benefits that local food produce brings to a community through a case study of Harvest Launceston farmers' market -- held weekly in Launceston, Tasmania (Australia).

We explore how the market, beyond a selling point for local food, suggests a broader reflection on the cultural and social value and aesthetics of food. We explore the symbolic value of food consumption in the context of the region of Tasmania, a renowned region for the high quality of its food and agri-tourism. We observe food as a two-fold thematic element and explore the food as a driver of many forms of value. We observe the farmers' market as a creative hub for sustainable food consumption, assessing its value on three levels following the dimensions suggested by Fillis et al. (2015): motivations, experiences and perspectives of patrons and stallholders. We provide some insights into the economic and environmental benefits the market provides. The impact of the cultural and social value of the market is also assessed in terms of the sense of 'embeddedness' and social connection around the consumption of food experiences by both locals and tourists Hinrichs (2000, p.299).

We adopt a mixed-methods approach, combining quantitative and qualitative data through a series of on-site surveys to farmers' market patrons and stallholders in April/May 2019 (complementing a first round of surveys carried out in April 2017, see Yanotti & Ripoll Gonzalez, 2018). We follow up market participants' experiences around three main aspects of the market two years later and after a considerable reconfiguration in the physical space of the market. We consider the market as a food hub, as a retail shop for high-quality local produce, and environment to share and disseminate knowledge around food production and consumption. Most importantly, we demonstrate how the market becomes a platform for social interactions and networking and community building that provides a holistic cultural and wellbeing activity for the community at large as well as a tourist event.

The economic value of the market is inferred from patrons' average weekly expenditure in the market, tourists' expenditure in the market, as well as willingness to pay for certain added features that the market provides to the community. The role of food in community building is measured through participants' motivations and experiences in the purchase, consumption and interaction with the local food and local gastronomy, as well as their reported levels of enjoyment or entertainment in regard to the market cultural experience at large. Participants' motivations, their backgrounds and previous experiences, provide a context to situate the perceived social value of the market.

This research informs cultural and regional community development policy. It describes shared characteristics of market participants and their perceptions and valuation of its benefits, including those benefits to the broader community. It also provides a comparative analysis of data in relation to food and community building. The research also outlines potential benefits of utilising food and farmers' markets as catalysts or platforms for creating cultural and social value for a community, as spaces for dialogue, education and communication of research around the wellbeing benefits for a community around sustainable food consumption, as well as spaces for encounters and local community building, with implications and benefits for tourism and the local economy.

ACKNOWLEDGEMENTS

We would like to acknowledge Harvest Launceston's committee, employees, volunteers, stallholders and attendants for their cooperation and support. We would also like to acknowledge the initial seed funding support for this project received from the Pro Vice-Chancellor Community, Partnerships & Regional Development Cultural Value Research Grant 2017. Finally, we thank Dr Kim Lehman for his revisions and suggestions for improvement.

METHODOLOGY

A case study was conducted in Australia's smallest and only island state of Tasmania. The case study explores the motivations and perceptions of a farmers' market by patrons and stallholders (Yin, 2003), as well as motivations to attend the market and perceptions of its impact in the Launceston community, beyond economic impact.

In this research we employed mixed-methods analysis, with a series of quantitative questions coupled with open-ended, reflective qualitative questions. The quantitative analysis in this industry report includes descriptive statistical analysis. The analysis of qualitative data includes a mix of deductive and inductive coding, consequently interpreted through constant comparative analysis – Glaser (2017) and Miles and Huberman (1994) – outlining contextual and cultural factors that affect perceptions of the market and motivations to attend. Relevant quotations and excerpts are used to contextualize meanings and illustrate the findings. Meaning is interpreted within a specific social context; De Saussure (2011). The most salient codes formed a matrix that guided the thematic organisation of text from the surveys and was divided in two parts: stallholders' perceptions and patrons' perceptions. The analysis is also informed by field notes and archival data provided by the Harvest Launceston Committee and online searches.

We carried out two on-site longitudinal surveys for four consecutive Saturdays (market day) during April and May 2019. These were a continuation from data collected from the same survey tool in April 2017. One of the surveys was directed to market customers and attendants, while the other was specific for stallholders. Both customers and stallholders were invited to participate, were provided with a project information summary sheet, and with a copy of the survey instrument.

The customer survey took the form of a long questionnaire with different sections designed to measure the intrinsic value of food and community. The sections in the survey included: (A) Harvest Launceston market perceptions with questions related to the frequency, motivation and opportunity cost of attendance; (B) spending patterns in the market to measure the value of food and community, (C) willingness to pay questions to complement the measurement of value of food and community; (D) general perceptions on farmers' markets and the role of food in culture and wellbeing; and finally (E) market attendants' demographic questions.

A total of 500 customer surveys were distributed between 9am and 12pm on four consecutive Saturdays of April and May 2019: 20th and 27th April and 4th and 11th May. Some important events in and around Launceston were happening around those dates. We decided to survey through four consecutive Saturdays to control for special events in particular weekends. The first weekend was the Easter weekend (April 20th) holiday which would attract people to visit the state. The holiday period might have also incited locals to enjoy a day out, many people may also leave the state during the Easter holiday or decide to spend a quiet reserved weekend at home due to religious beliefs. On the weekend of the 27th April Launceston hosted an Australian Football League (AFL) game between Hawthorn and Carlton teams[2], which attracted both visitors and locals into the city. On the same weekend, as well as the AFL match on Sunday, there was also the Launceston Night Market and the Fresh Hop Festival. The weekends of the 4th of May coincided with the celebration of AGFEST. The 11th of May coincided with Mothers' Day. The 20th and 27th April were sunny, and the weather was relative warm, and both 4th and 11th of May were very cold but sunny days.

The surveying methods included both personal intercept surveying and voluntary (self-selection) surveying, with the aim of collecting a random sample. Harvest Launceston market has a sit-down area with some tables in the middle of the car-park where the market takes place; some surveys were available on the tables during the whole morning and customers and guests were welcomed to

[2] https://harvestmarket.org.au/hawkas-fork-fun-for-kids-april-27-2019/

complete them at their own time and preference (with the oversight of surveyors). We also had surveyors standing at the entrances of the market doors inviting people to complete the surveys, providing them with a questionnaire or sometimes completing the questionnaire for them in order to decrease non-response bias. Some people decided to take the survey home and return it the following weekend at the market. The survey had no compensation or reward associated with its completion.

The stallholders' survey also took the form of a questionnaire with different sections which included: (A) businesses motivations to participate in Harvest Launceston market; (B) general perceptions on farmers' markets and the role of food in culture and wellbeing;[3] and finally (C) demographic questions about stallholders' businesses.

A total of 60 stallholders' surveys were administered directly to the stallholders by the researchers during market hours in the four Saturdays of April and May 2019 mentioned above. They were invited to complete the survey during market hours or to take it home to avoid disturbing their working hours. Stallholders were provided with a project information sheet and were asked to complete consent forms to confirm their acceptance and knowledge of any slight possibility of re-identification.

Our total collected dataset contains 363 completed customer surveys and 33 stallholders' surveys; with a response rate of 73% and 55% respectively. The following sections describe the quantitative and qualitative analysis of the data collected where results for the data collected from market attendants and customers are presented. A section describing the data obtained from market stallholders follows. We then present the conclusions and implications of the findings.

MARKET ATTENDEES

This section describes the characteristics of people that attended Harvest Launceston and answered the survey. Although respondent demographics were included at the end of the questionnaire in Section (E) we start our analysis by providing an overview of the market attendees sample to contextualise our results.

The customer questionnaires were mainly provided to Harvest Launceston attendees. Figure 1 below shows the attendance frequency reported in the customer survey. Most people said they were regular attendees of the market (45%), some said they occasionally attended (26%), for a few people (including visitors) it was their first time at the market (18%), while some others were frequent attendees (10%).

The typical survey respondent was a female between 25-34 years of age, with a university degree and a relatively high household income; see Table 1 below. Harvest Launceston market attendants are younger, more educated and manage higher household incomes than the typical Tasmanian.[4] Tasmania has 51.1 % female population according to 2016 Census data. Males represented only 30% of our surveyed sample. The high proportion of females completing the survey may be due to self-selection bias if women are more prone to complete a survey than men, or may be due to more women attending the market than men. Surveyed market attendants were well represented across all ages, although there was a larger representation of people in the 25-34 age bracket; see Table 1 below. Tasmania's median age is 42 years old, with 11.4 % people between 24-35 years old.

Over 80% of surveyed attendants were residents of Tasmania, with 64% residing in Launceston's surrounding areas. There were also many visitors completing the survey; 16.1% of respondents were interstate visitors mainly from New South Wales and Victoria. A few respondents (1.7%) were

[3]This section was very similar to section (D) in the customer/market attendants' questionnaire.
[4] See 2016 Census data for Tasmania -- http://www.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/6?opendocument.

international visitors from U.S.A., Germany, Hong Kong, Singapore and New Zealand.[5]

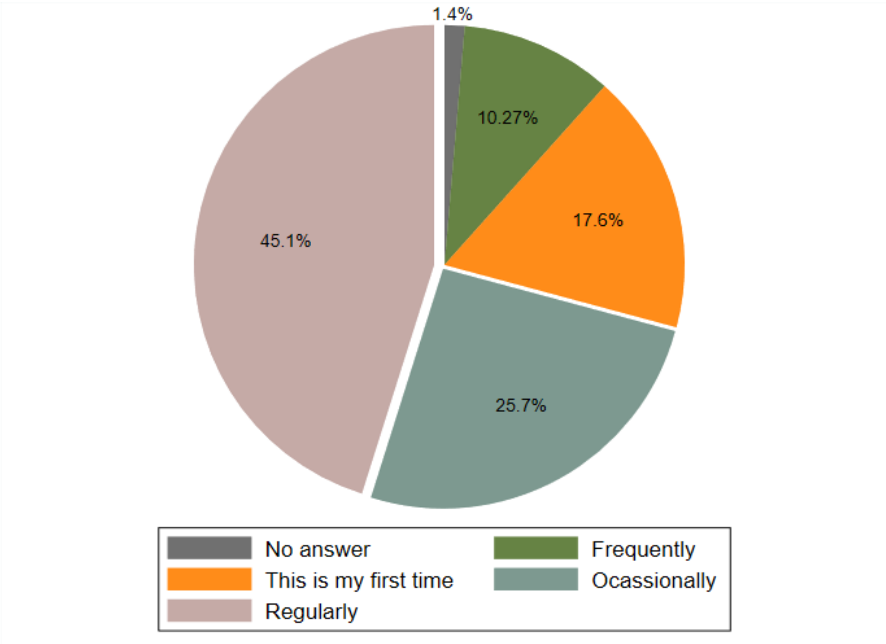


Figure 1. Attendance frequency to the market.

Market attendees are more educated than the typical Tasmanian. Majority of survey respondents (72%) held a university degree or postgraduate degree, while for a minority's highest educational attainment was senior secondary (13%) and secondary (6%); see Table 1 below.[6] Comparatively, the 2016 Census reports that only 16% of Tasmanians held a bachelor's degree level and above, while 12% of Tasmanians aged 15 and over reported having completed Year 12 as their highest level of educational attainment.

Almost a third of respondents reported to have household annual income of over AUD $100,000, while the 2016 Census reports that only 21% of Tasmanian (and 19% of Launceston's residents) have a weekly household income greater than AUD $2,000 (AUD $104,000 annually).[7] An additional 30% decide not to provide income information. The remaining 39% reported to have household annual income of under $50,000; see Table 1 below. The income brackets were designed based on Tasmania's median household income of AUD $1,100 (AUD $57,200 annually) for 2016[8] and tax brackets.

While 13.5 % of respondents attended Harvest Launceston by themselves, 38.7% attended with one more person, and a further 18.9% and 11.6% attended with two and three people respectively.[9] A further 15.1% attended the market with 4 more people or more.

---

[5] Only 10 (2.7%) respondents did not provide a postcode or wrote an incorrect/inexistent postcode.
[6] A few respondents (28 or 7.8%) decided not to provide information on their educational attainment.
[7] See 2016 Census data - http://profile.id.com.au/australia/household-income?WebID=150 for Tasmania, and http://profile.id.com.au/launceston/household-income for Launceston.
[8] See 2016 Census data - http://www.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/6?opendocument.
[9] A total of 36 people (10.1%) did not complete this question.

Table 1: Surveyed attendants' demographic characteristics.

Variables	**Proportion**
Gender	
Female	64.9%
Male	33.5%
Other	1.6%
Age bracket	
18-24 years old	10.5%
25-34 years old	21.6%
35-44 years old	14.9%
45-54 years old	16%
55-64 years old	19.2%
65-74 years old	13.5%
75 + more years old	1.9%
No answer	2.4%
Highest educational attainment	
Secondary/high school	2.7%
Senior secondary/College	13.2%
VET/Trade certificate	7.8%
University degree	41.6%
University post-graduate study	30%
Other	1.1%
No answer	3.5%
Household annual income	
Under $30,000	9.2%
Between $30,000 - $49,999	13.5%
Between $50,000 - $69,999	16%
Between $70,000 - $99,000	0%
$100,000 and over	30.8%
Prefer not to answer	30.5%

(A) Motivations to attend Harvest Launceston

We explored participants' motivations for attending farmers' markets and, in particular Harvest Launceston market. We find that market customers find attending Harvest Launceston a social weekend activity, and not a mere shopping outing. They acknowledge and appreciate the community building generated by the farmers' markets interactions.

Figure 2 shows that most market attendees see Harvest Launceston as a social/touristic environment where they can access fresh and local produce. Almost a third of respondents attend Harvest Launceston 'because of the local feel of the market'. They choose to go to Harvest Launceston `because of the local feel of the market' (35%), 'for a day out/have drinks and food' (16%), 'to meet family and friends/socialise' (9%), and 'to buy fresh and local produce' (4%). Moreover, 18% of survey respondents were tourists (interstate, intrastate and international) and attended Harvest Launceston as a touristic attraction.

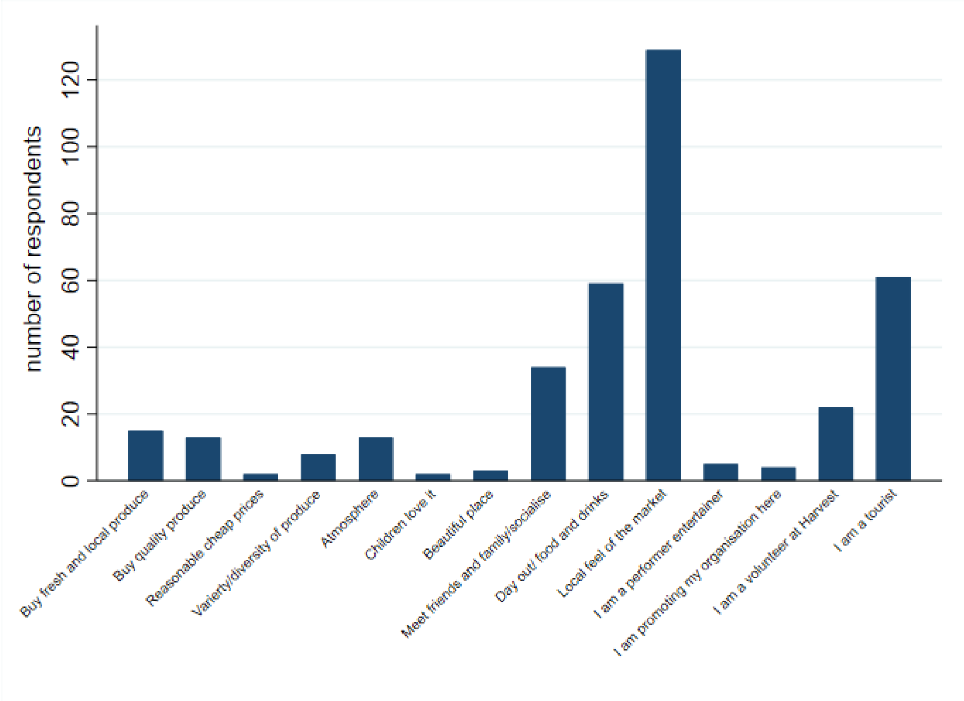


Figure 2. Reasons to attend the market.

Few specify that they attend Harvest Launceston 'to buy quality produce' (4%), or 'because of the variety/diversity of produce' (2%). A few others point out they attend 'because of the atmosphere' (4%), and 'because it is a beautiful place' (1%). Very few justify their attendance 'because of reasonable/cheap prices' (0.5%). Some of the survey respondents attended Harvest Launceston because they were 'performers/entertainers' (1.4%), Harvest Launceston volunteers (6%), or were promoting their organisation at the market (1%).

Figure 2 above supports the findings that respondents attend the market 'for a day out/have drinks and food', presumably to enjoy the social environment at the market. Survey respondents primarily buy food and drinks in the stalls to consume at Harvest Launceston (88%). They also buy primary produce (6%) – such as vegetables, fruits, meat, cheese, bread, etc. – and value-added products (5%) – such as wine, honey, jam, oil, etc. A small number of respondents reported buying nothing at the market (1%).

To measure their attendance opportunity cost – what were they giving up in terms of time and money – in order to attend Harvest Launceston market, we asked them what other markets they generally attend and what would they have been doing on a Saturday morning if they were not at the market.

Attendants' opportunity cost on Saturday mornings was mainly related to home and household activities; see Table 3. Most reported that if they weren't at the market they would be at home (45%), doing house chores (15%) or sleeping (11%). Some would be gardening (8%), relaxing (8%), or cooking (6%), amongst others. Respondents also mentioned they would be driving around, exploring or travelling (12%), as well as doing sports or going to the gym and other outdoor activities (14%) if they were not at the market. Socialising activities such as being with kids and family or visiting friends were also mentioned. While activities related to wellbeing represented 48% of the opportunity cost of being at the farmers' market, some reported they would be working (8%) or studying/reading (4%). Moreover, some reported they would be shopping elsewhere (4%) or attending another event or market (2%).

Table 3: If you weren't here today, what would you be doing?

Responses regrouped by themes	Proportion
Home related	44.5%
Wellbeing related	47.8%
Exploring related	12.3%
Sports or Outdoors related	14.2%
Food related	5.2%
Shopping related	5.7%

Most market attendants (69%) reported to attend other markets besides Harvest Launceston. Table 4 lists the markets mentioned by respondents with the proportion of respondents that reported to attend each market. Some visitors reported that they regularly visit their local markets interstate (i.e Sydney, Melbourne, Brisbane and Gold Coast) and internationally (15%). However, most respondents attended local and state markets, mainly Evandale market, and Salamanca market and Farmgate market in Hobart. Other state markets included Deloraine market and the Night Market in Launceston.

In addition, we asked respondents how they heard about Harvest Launceston. Over half of respondents said they found out about Harvest Launceston from friends, relatives or colleagues. Other sources were 'social media (Instagram, Facebook, etc.)' (16%), 'Harvest Launceston advertising' (10%), 'media (radio or T.V.)' (7%), 'tourist office or tourism website' (4%), 'travel review site or magazine' (5%), 'Food review site or magazine' (2%). A few patrons specified more detail and reported that they heard about Harvest Launceston from 'word of mouth' (10%), or because they walked by (6%). 5% reported that they have known the market since its inception.

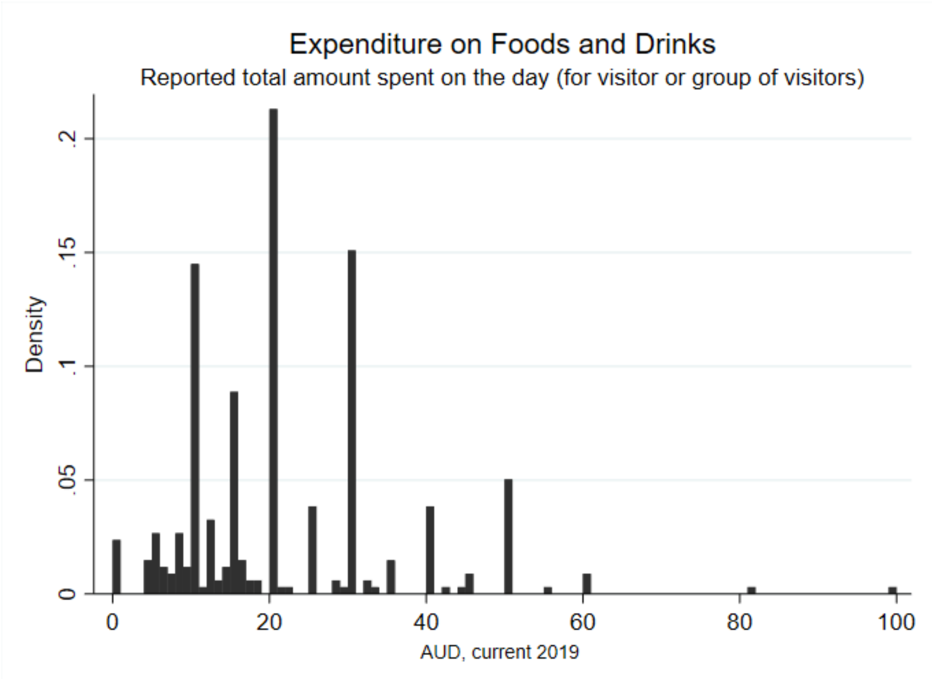
Table 4: Do you attend other markets? Which ones?

Do you attend other markets?	Proportion
No	23.2%
Not regularly	11.7%
Evandale market	21.6%
Salamanca market	12.6%
Farm gate market	7.1%
Esk market	2.2%
Other local markets	25.1%
Other state markets	23%
Interstate markets	15%
International markets	2%
All sorts of markets	1%

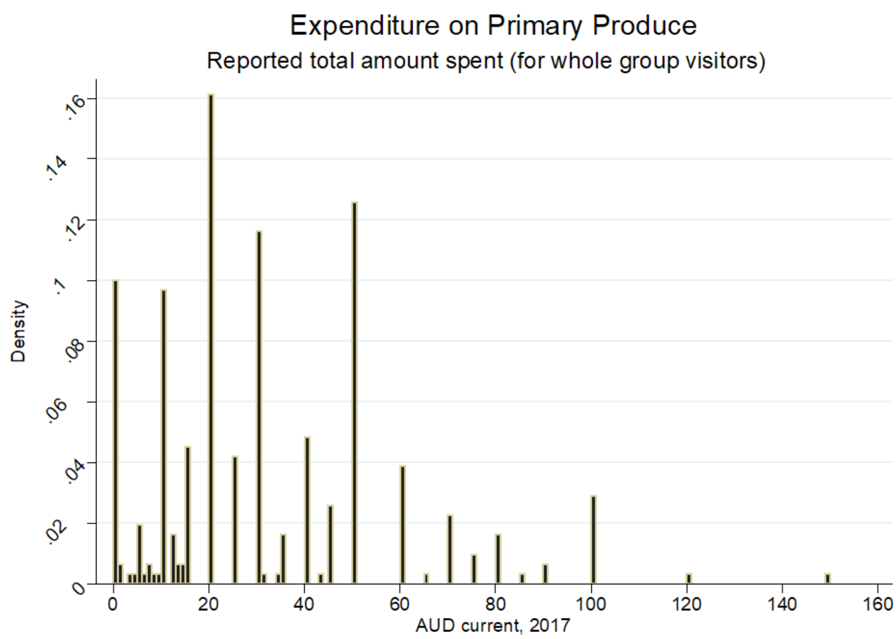
(B) Spending patterns

The survey asked market attendees to provide information on their spending patterns during their visit to Harvest Launceston on the day they completed the survey. Table 5 below shows the distribution of the expenditure patterns for the different categories.

Most market visitors bought mainly food and drinks, and they spent on average $21.4 (see Graph 1 below). Survey respondents reported to have spent on average $30 on primary produce purchases (See Graph 2 below). They spent on average $12 on value- added products – such as wine, honey, jam, oil, etc.

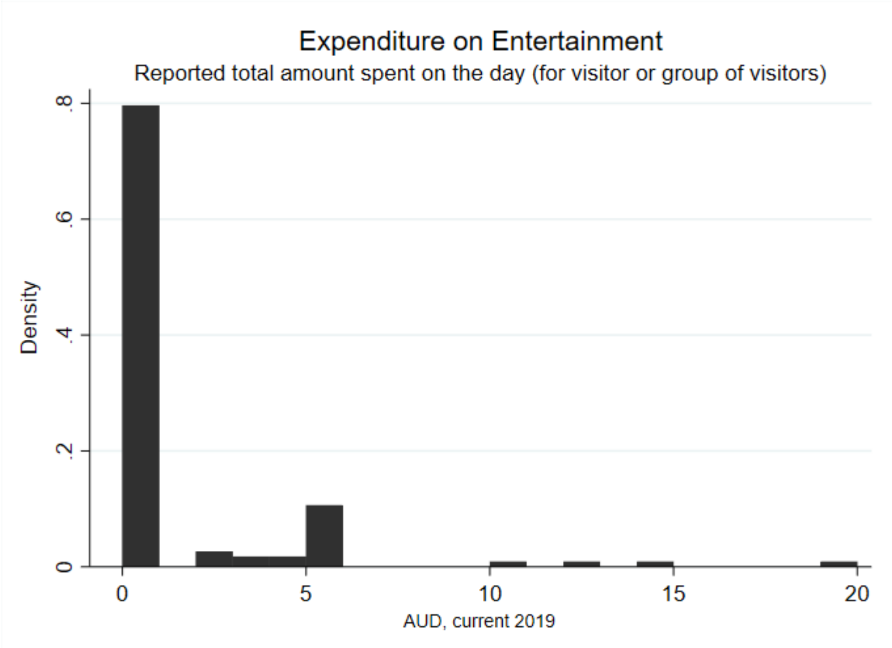


Graph 1: Attendees expenditure on food and drinks.

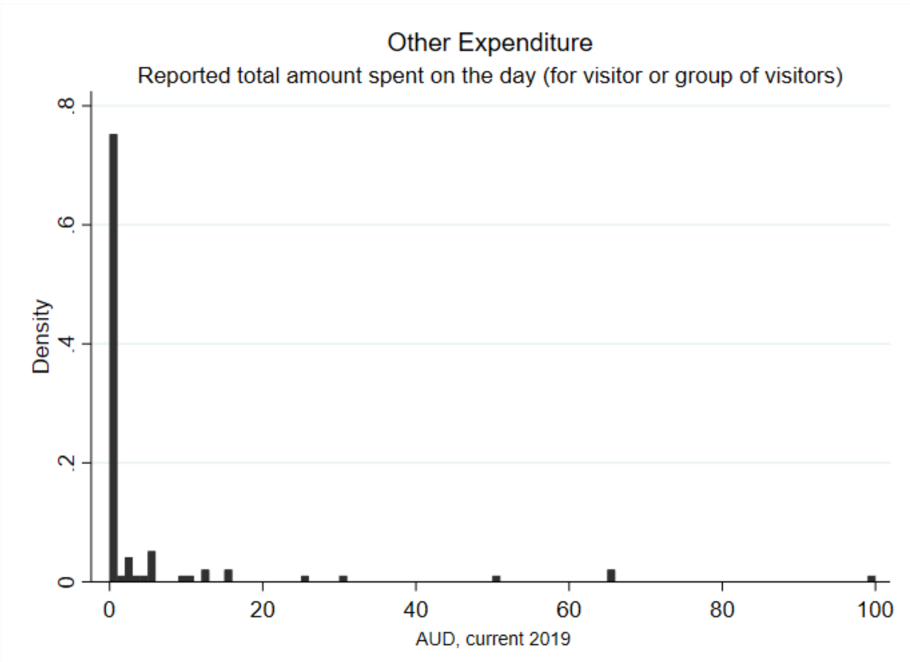


Graph 2: Attendees expenditure on primary produce.

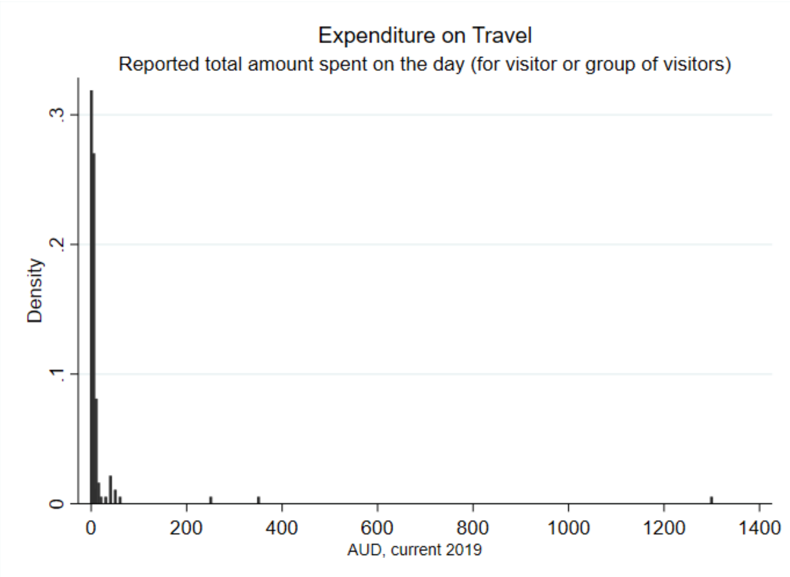
Respondents were also asked about other market related expenses in order to estimate the overall cost of attending the market. They reported having spent on average $1.2 for entertainment (see Graph 3 below); there are usually some music street performers (buskers) and market goers may give some gold coin donations. They also estimated having spent on average $15.3 on travel (petrol, bus, taxi, etc.), however here the median travel expenditure of $3 is a better indicator because some tourists reported the cost of the airfares to Launceston (see Graph 5). They reported having spent on average $4.3 on other expenditure (see Graph 4 below), which could have mainly included parking; but respondents could have also thought of other expenses in retail around the city even though the question was specific to expenditure at the market.



Graph 3: Attendees expenditure on entertainment.

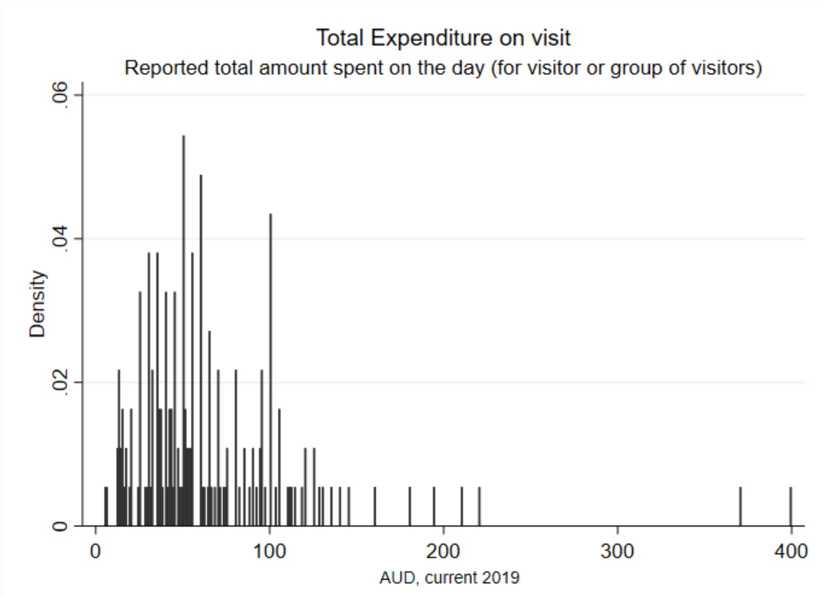


Graph 4: Attendees other expenditure.



Graph 5: Attendees expenditure on travel.

Overall, market attendants reported to have spent on average $60 during their visit to Harvest Launceston for themselves and any other member of their group. Half of market attendants spent $50 every Saturday; see Graph 6 and Table 5 below.



Graph 6: Attendees total expenditure (excluding travel expenditure outlier).

Table 5: Spending patterns.

Expense	Mean	Min	Median	Max	S.D.	No response
Primary produce	$29.7	$0	$25	$150	(23.5)	**15.1%**
Value-added products	$12	$0	$10	$100	(15.6)	50.8%
Food and drinks	$21.4	$0	$20	$100	(13.6)	**8.6%**
Entertainment	$1.2	$0	$0	$20	(3)	69.5%
Travel	$15.3	$0	$3	$1300	(110.3)	50%
Other expenses	$4.6	$0	$0	$100	(15)	73.8%
Total	$59.9	$0	$50	$1360	(80.3)	

(C) Willingness to pay (contingent valuation)

In order to complement the spending pattern information, we asked market attendants about their willingness to pay to estimate the aggregate willingness to pay of market attendees, an approach to measure the social benefits of the market known as 'contingent valuation'. The section above presented aggregate results of patrons' expenditure in the market. In this section participants' willingness to pay refers to what respondents report to be willing to spend. To measure willingness to pay we asked survey respondents to report the surcharge percentage they were willing to pay on top of normal competitive prices when considering different added features to their purchases in the farmers' market. In addition, and in order to get a more in depth understanding of their reasoning beyond the reported willingness to pay, we asked participants to explain in an open-ended question *why.* This section was composed on four main sections responding to the following questions:

1. *How much more are you willing to pay for your weekly purchase of local and fresh produce at farmers' markets relative to the supermarket?* The focus here is on the nutritional and health value of food.
2. *How much more are you willing to pay to support local farmers at farmers' markets?* The focus here is on supporting the local community.
3. *How much more are you willing to pay for some products at farmers' markets in order to connect with your community?* The focus here is on community wellbeing and the role of the market as a meeting point for farmers and locals, for locals at large, and for locals and tourists.
4. *How much more are you willing for some products at farmers' markets that support and promote sustainable practices?* The focus here is on sustainability.

Question 1. Food, health and farmers' markets

When valuing local and fresh produce, over a third (37%) of market attendants said they were willing to pay between 11-20% above the normal competitive prices; see Figure 3(a). 72% also respondent the open-ended questions on *why* it was so.

In addition, a qualitative analysis of the open-ended responses attached to this question showed that of the 72% of participants that responded to this questions, some were willing to pay more for: 'quality and long lasting food' (41%), 'to support local producers' (35%), buy 'local' food (20%) 'fresh produce' (27%), 'sustainable food and food products' (5%). Some respondents reported constraints by budget limitations (16%) which indicated the potential of a higher willingness to pay but lower affordability. Finally, 3% of respondents stated the convenience of the supermarket as a deterrent to purchase fresh food at the farmers' market. See below some excerpts from the qualitative responses illustrating the findings reported in this section:

Live on aged pension.

Value of speaking and meeting producers, quality and atmosphere.

Value of local produce versus my budget.

Support local! Fresh produce, great flavours and primary produce last longer!

Would buy everything local, but not everything is available when needed.

Compromise between quality and price.

**It should be cheaper than the supermarket as there are less costs.*

I am happy to pay a little more but not too much as they don't have the on costs that retailers have.

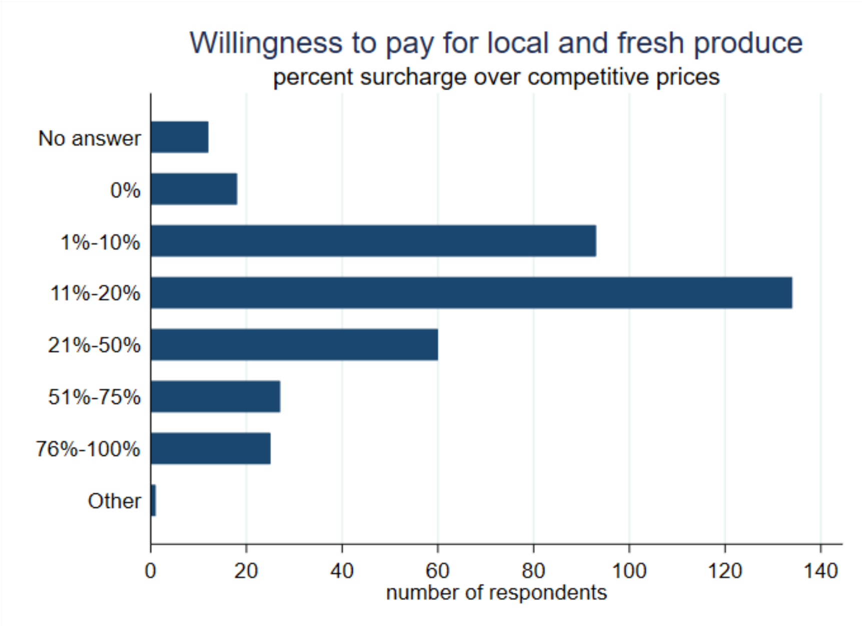


Figure 3(a): Willingness to pay a surcharge for local and fresh produce

Question 2. Supporting the local farmers' community

When valuing support to local farmers, also over a third (35%) of market attendants said they were willing to pay between 11-20% above the normal competitive prices; see Figure 3(b).

In addition, a qualitative analysis of the open-ended responses attached to this question showed that of the 46% participants that responded to this question, were willing to pay more for: 'supporting producers and Tasmanians' (38%), for a great community interaction space, where they can experience local culture and learn from the local farmers, with a great atmosphere (25%), and 'for the quality of produce'(9%). Some respondents reported again constraints by budget limitations (11%) which indicated the potential of a higher willingness to pay but lower affordability and 22% of respondent stated that this is irrelevant for them. See below some excerpts illustrating the findings reported in this section:

Because I would rather support the producers directly plus community and social engagement.

Premium for conviviality and encounters.

Community is important, but not my primary motivation.

Health is about connection to others as well as nutrition.

I already connect with the community in many other ways.

Don't value those connections.

Because it is an enjoyable way to spend Saturday morning.

Artifically subsidising local farmers benefits no one in the long run.

Expensive as it is.

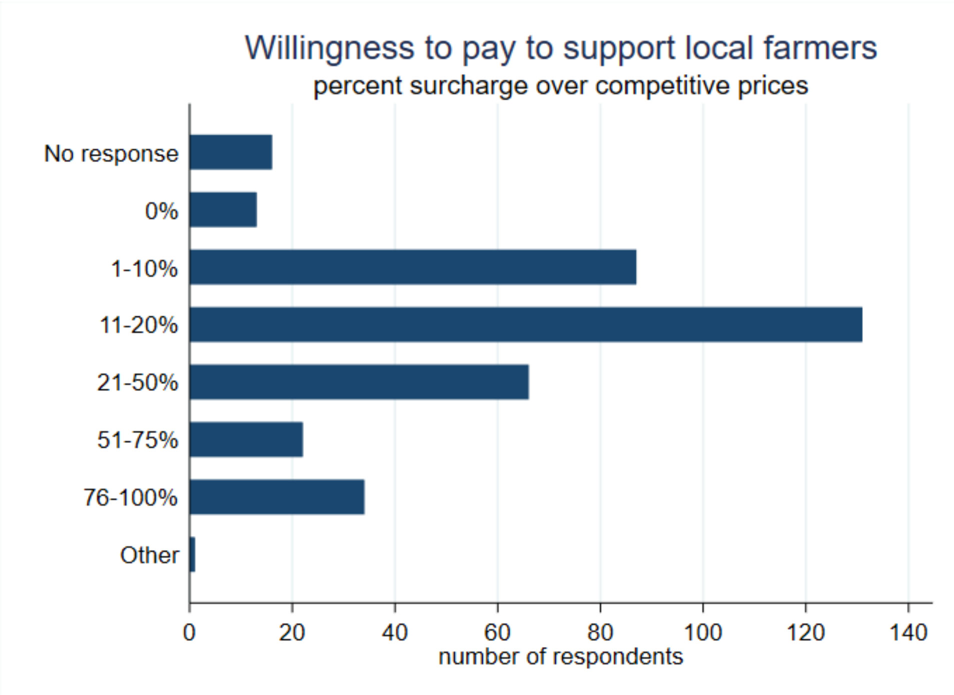


Figure 3(b): Willingness to pay a surcharge to support local farmers.

Question 3. Community and wellbeing

Most interestingly, 62% of respondents were willing to pay a surcharge between 1-20% for their groceries and food in order to connect with the community; see Figure 3(c). Moreover, 9% of respondents reported to be willing to pay over 50% surcharge if they are enjoying the connection with their community. However, 17% of respondents were not willing to pay above normal competitive prices just to socialise and connect with the community or chose not to answer the question.

In addition, a qualitative analysis of the open-ended responses attached to this question showed that of the 46% participants that responded to this question, were willing to pay more for: 'supporting producers and Tasmanians' (36%), for a great community interaction space, where they can experience local culture and learn from the local farmers, with a great atmosphere (28%), and 'for the quality of produce' (8%). Some respondents reported again constraints by budget limitations (12%) which indicated the potential of a higher willingness to pay but lower affordability and 25% of respondent stated that this is irrelevant for them. See below some excerpts illustrating the findings reported in this section:

We like to meet the farmers. It is part of the ritual every week.

Premium for conviviality and encounters.

Quality, freshness, value, supporting LOCAL families' incomes. I have a responsibility to contribute my wealth to my community.

Connection with community provides value for personal wellbeing a value within the society as a whole.

If the product has a better quality AND I can connect with the producer.

I love eating the migrant community's food stalls.

Not relevant, tourist.

Connection is dependent on stallholders.

This market charges its vendors a hefty fee. Accordingly, the mark-up on products reflects the high rent. I think you should charge vendors with perishable produce or low demand less.

20% on top is reasonable, price to pay as extra support.

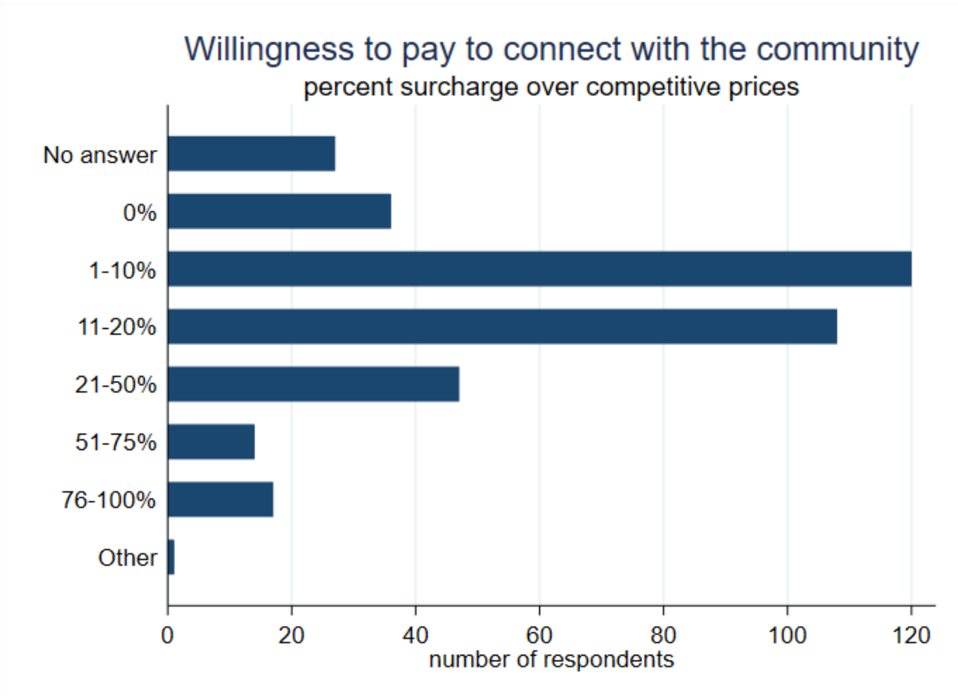


Figure 3(c): Willingness to pay a surcharge to connect with the community.

Question 4. Sustainable practices

51% of respondents are willing to pay a surcharge somewhere between 11-50% that values sustainable practices; see Figure 3(d).

In addition, a qualitative analysis of the open-ended responses attached to this question showed that of the 43% participants that responded to this question, were willing to pay more for: 'sustainable' and 'ethical' practices (70%), to 'support local' (14%) and 'for the quality of produce' (8%). Some respondents reported again constraints by budget limitations (11%) which indicated the potential of a higher willingness to pay but lower affordability and 8% of respondent stated that this is irrelevant for them or had negative feelings towards it. See below some excerpts illustrating the findings reported in this section:

We prefer organic/sustainable produce and could pay slightly more but if too expensive could not continue.

Global warming, environmental sustainabilty is important to me /us.

Offset bulk-buying capacity of supermarkets, quality, local business support and smaller carbon footprint.

Sustainable practices often cost more, but they need to be encouraged.

I want a clean a world for my grandchildren.

Sustainability - means long-term survival from an ecological and a financial point of view.

It is important to eat well and healthy and locally grown fresh food.

If the produce reduces agri-commercial environmental impact, I am willing and able to pay more.

Bottom line is my budget, would spend more if I had it.

I want these producers to flourish. However at evandale the rent is minimal so prices are lower and low income people can afford to shop there. Most items are too expensive for me here. Sustainability should not only be affordable to those with paid employment.

Sustainable should be sustainable for poor people.

All producers should be doing this.

Would need to know how they are sustainable.

Again, a litle but sustainability not major priority.

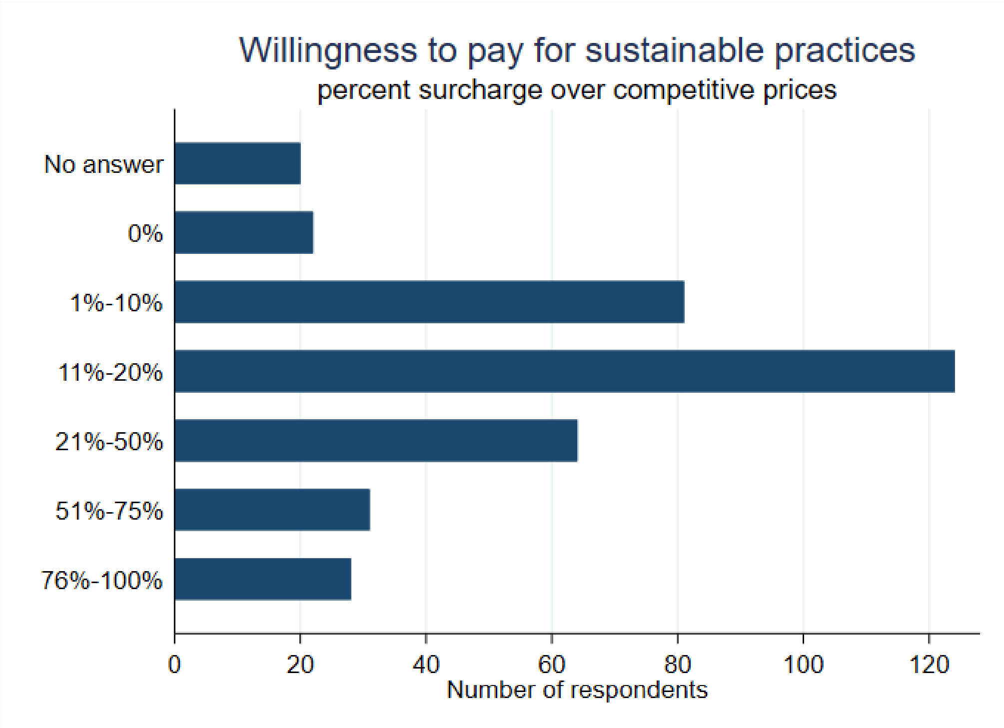


Figure 3(d): Willingness to pay a surcharge to support sustainable practices.

(D) Attendants' perceptions towards farmers' markets

Overall market attendants have very positive perceptions towards farmers' market and in particular towards Harvest Launceston. Most surveyed market attendants reported the main benefits farmers' markets bring to the community to be the following: 'promotes regional and local agriculture and supports local farmers' (85%) and 'provides a one-stop shop to access fresh, local, seasonal and nutritional food' (75%). Other benefits include the farmers' market 'supports community, local groups and other initiatives' (77%) and 'adds to the livability of the city' (72%).

Experiencing farmers' markets allows market attendants to learn about `produce seasonality' (72%)

and teaches them 'where food comes from' (50%). Others note that they learn about 'community around food and sharing' (40%), 'how is produce made' (30%) and 'the tradition about produce' (25%).

We used a typical five-level Likert scale to ask market attendants about particular aspect of farmers markets. The overwhelming majority agreed or strongly agreed that 'farmers' markets contribute to availability of fresh and local food' (95%) and that 'produce in Harvest Launceston is of high quality' (94%).

Majority of respondents also agreed or strongly agreed that 'Harvest Launceston offers a variety of food and produce' (90%) and 'farmers' markets contribute to Tasmania's agri-tourism industry' (88%).

Moreover, respondents also strongly agreed or agreed on the premise that 'Harvest Launceston offers opportunities for community engagement and entertainment' (79%), and that 'farmers' markets contribute to cultural diversity' (77%).

A smaller proportion, although still a majority of respondents, agreed or strongly agreed that 'produce and food at Harvest Launceston are reasonably priced' (72%).

We specifically asked attendants what do they like about Harvest Launceston. Table 6 shows the answers of respondents; some answers are broad and general, and it is not clear whether they refer to the market itself or the food and produce. Many respondents reinforced they enjoy the atmosphere, community around the market and the vibe and feel of the market. They also noted the freshness and quality of produce and food, and the friendly community.

Following on the positive feedback provided on the previous question, most respondents provided a negative feedback when asked how they would feel if Harvest Launceston was to close down. Table 7 summarises their answers.

Lastly, we asked attendants to choose one word to best describe the community at Harvest Launceston. 68% of respondents provided a positive feedback. Table 8 lists the answers by grouped themes. The most used words to describe the Harvest Launceston community were 'friendly', 'engaging', 'inclusive', 'community' and 'vibe'.

Table 6: What do you like about Harvest Launceston?

Responses regrouped by themes	Proportion
Overall positive	68.3%
Neutral (i.e. sustainability, collaboration, local, etc.)	29%
*Negative perception	0.6%
Friendly	21.6%
Engaging/welcoming/warm	18%
Diversity/inclusive	11.8%
Very positive (awesome, perfect…)	8.47%
Community/social/togetherness	7.6%
Atmosphere/environment/vibe/feel	4.9%
Positive affirmations	4.6%
Vibrant	4.37%
Happy	3.8%
Collaborative/supporting	2.46%
Local	1.9%
Relax	1.9%
Quality	1.64%
Sustainable/healthy	0.8%
Family	0.6%
Unique product	0.3%
No response	1.6%

Table 7: How would you feel if Harvest Launceston was to close down?

Responses regrouped by themes (94.2% responded)	Proportion
Negative	100%
Devastated	15.2%
Disappointed	13.1%
Angry	5.2%
Sad (terrible)	4.4%
Bad	1.7%

Table 8: Choose one word that best describes the community at Harvest Launceston.

Responses regrouped by themes	Proportion
Positive	67.51%
Friendly	22.1%
Engaging, welcoming, warm	18.5%
Diverse, inclusive	12%
Very positive	8.7%
Community, togetherness	7.8%
Atmosphere, liveliness	5%
Positive	4.8%
Vibrant	4.5%
Happy	3.9%
Negative	0.8%
Neutral / Others	29.7%

Survey respondents were invited to provide further feedback on the role of food in building communities and wellbeing. Over 40% of respondents (151 people) took the time to answer the last question of the survey: 'Is there anything else you would like to say about the role of food in building communities and wellbeing?'; 7 respondents said they had nothing else to say and 57% did not answer the question.

The additional feedback on the role of food in building communities and wellbeing provided was mainly related to food and wellbeing, community, socialisation and suggestions for improvement, with many remarks about the location of the market (at the time of the survey, Harvest Launceston was considering whether and where to relocate the market in light of surrounding hotel development that has significantly reduced the carpark area where the market takes place).

Some comments related to **food and wellbeing** included:

> *I believe it is an important vehicle for creating community and wellbeing.*
>
> *It's vital and we like to contribute.*

The importance can be underestimated by has such far-reaching impacts on the health of our community at both personal and group level.

Teaches us about importance of food and quality. Also importance of real life interacion not all online communication.

Food is health and food connects people.

Just that it is a positive event that has transformed Launceston for many people. Also positive in promoting good healthy eating for children and adults.

Some other comments were more related to **community**:

Continue running. This is the most friendly community event I have seen in Launceston. It would be very sad for it to stop.

Eating is a social aspect --> take it away and the comminity is greatly impacted.

I am so pleased to be in such a vibrate community which is Harvest market. I would like to create a community kitchen to share growers food. (love heart)

Some other comments were related to the **inclusive and multicultural** aspects of the market:

'Ethnic' foods are a great way to improve intercultural relations.

I love coming and like talking to people from all walks of life and from all over the world while having my breakfast and coffee.

Bring more multicultural food!

The hot food stalls induce more people to turn up. The food is fresh and in some cases, innovative. Where the stalls use local produce eg. Cheese toast, I am tempted to buy the produce to use it at home. I would love to see more interantional stalls using local produce to make their food. EG. I loved the Afgan-Bolani good, it is a synergy of local produce and international food to eat. Also the Japanese/Asian stalls as well.

Very important and transcend all cultures and communities.

Some emphasised the **challenges** around access to fresh food for **lower income** groups:

To build communities and well-being food most be reasonably priced and accessible to EVERYONE not just the priviledged.

I like to see more healthy economically recipes using cheaper things.

Really important. Venue does not cater well for low socio-economic background. Too middle class for some in community woild not fit cultural background. Deep cultural elements need to be understood. Middle class and tourists work really well. Does not need to include everyone but could expand.

Needs to maintain value for money and not become elitist.

Some comments emphasised the **role of the market in connecting people and place**:

It connects people.

Sharing food is the ultimate and brings understanding and community.

A great addition to the community, I rely on it!

Often carnival atmosphere = social benefit and health in city area. Vitality support ++ local *community or small niche farmers and producers.*

Food is health and food connects people.

Builds connection - key for both community and wellbeing.

Food=fellowship. We all have to eat!

Food is a natural attraction for engagement with others.

Food can contribute to health, sharing experinnces and knowledge, traditions, education.

Some comments in support of the role Harvest Launceston plays in **promoting shopping locally grown foods**, **highlighting Tasmanian produce and agri-tourism**:

We should support vendors as much as possible.

Food is the future of Launceston and the region.

Harvest Market is a great way to introduce guests to Tassie, to local produce

Go Tas (Tasmania).

The market is our favourite thing to do. It is a social event plus we get food that is locally grown and fresh. We have been at the market since the very beginning and feel it is a huge asset to Launceston we bring all visitors here too.

Like travel, it is an oportunity to try something new each week.

Supermarkets alienate communitites from their food sources. This market needs to offer a counteracting influence.

Farmers' markets provide a pleasant unstructured environment to shop and reduce supermarket monopolies.

It is a great chance for young kids to learn where food comes from and think about shopping locally from an early age.

We observed a **reiteration** of the **important role of the market** in supportive comments:

Happy to pay a small entrance fee towards sustaining the Harvest markets!

Imperative (smiley face).

Please never close down (love heart).

Please keep it going!

Do not change the market.

Please don't let this close.

Absolutely essential.

And finally, some comments around the **location** of the market and some suggestions for improvement included:

Make it over two days (all weekend).

No don't move position.

Keep it going - well done in you new space.

This last section was motivated by the threat at the time of the market moving to a new location due to a neighboring hotel development taking up some space off the carpark where the market occurs.

MARKET STALLHOLDERS

A total of 33 businesses completed the stallholder surveys during the four consecutive Saturdays in April-May 2019 that data was collected. The stallholders' questionnaire included a section of specific questions related to business characteristics. We start describing the sample of businesses that took part in our study.

Most businesses reported trading mainly value-added products (46%), followed by food and drinks (31%), and the minority of respondents sold primary produce (23%). On average, they employed 2.7 staff, while half of businesses had 2 employees. Some had combinations of full-time and casual employees, with the highest number of total employees reaching 15 people, varying by season. Under a quarter (20%) of businesses did not hire employees and were run by the owners.

Businesses have been attending the farmers' market on average for 5 years, with some businesses starting only 3 months before the survey, and some others had attended the market since its inception in 2012. This variety in the length and duration of business involvement and commitment provides a broad overview of businesses trading at Harvest Launceston.

All stallholders were Tasmanian businesses located in the Launceston vicinity, mainly in the areas around Exeter and Launceston, but some were based in Deloraine, Hadpsen, and Devonport. A few businesses were based in the south of the island, around Sorell.

Businesses reported their approximate weekly revenue (earnings) to be on average AUD $881; half of all businesses made at least AUD $725 a week on revenue. Those with the largest weekly earnings could reach up to AUD $2,500 every Saturday, while those with the lowest earnings made only AUD $200 a Saturday[16]. Their approximate weekly costs were on average AUD $278, with a range of weekly costs from AUD $50 to AUD $1,500[17].

We calculated that businesses' profits on a Saturday were on average AUD $623, with the highest profits reaching AUD $2,300 and the lowest ones around AUD $110. Figure 4 shows businesses reported annual income. Although many businesses preferred not to answer this question[18], 40% had annual income under AUD $100,000.

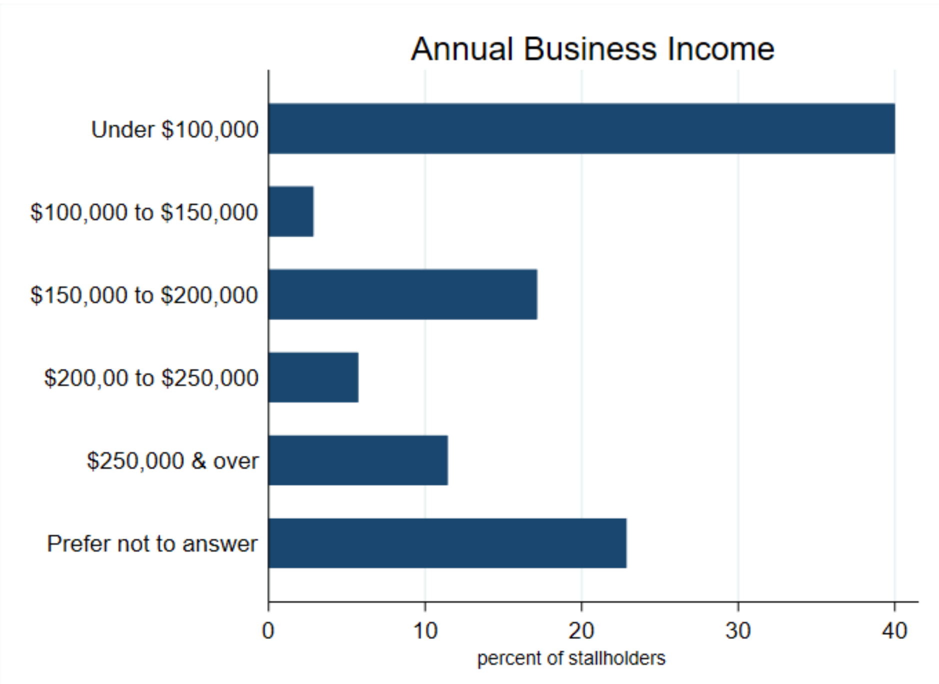


Figure 4. Stallholders annual income distribution.

Stallholder respondents were mainly men between 55-64 years of age. No stallholder was over 75 years old; see Figure 5. Over a third of stallholders had a university degree; see Figure 6.

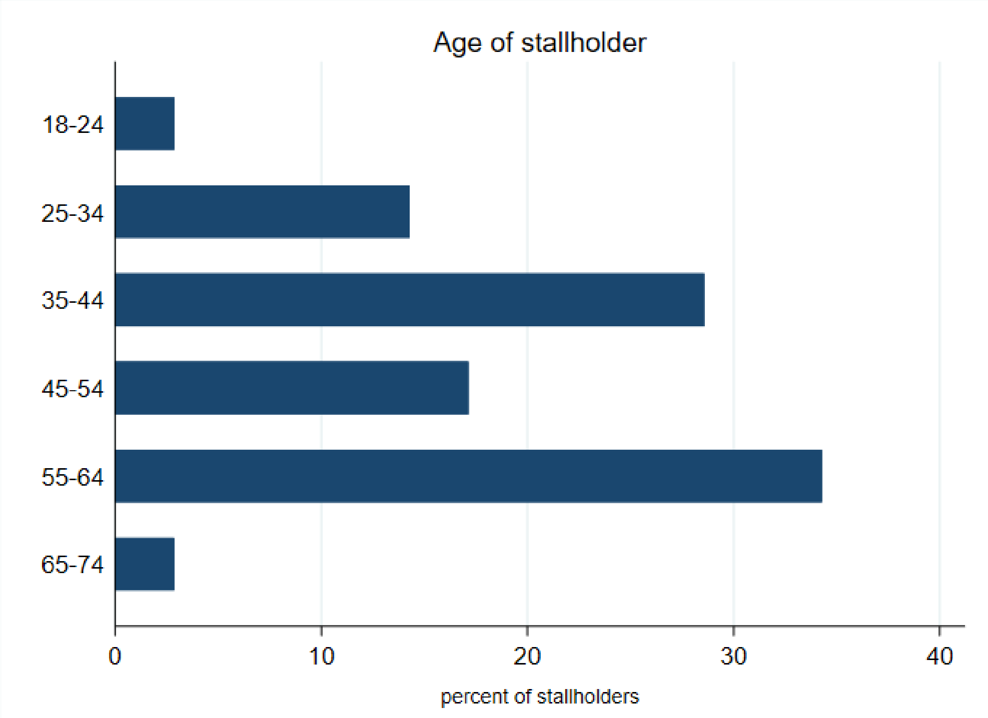


Figure 5. Stallholders age distribution.

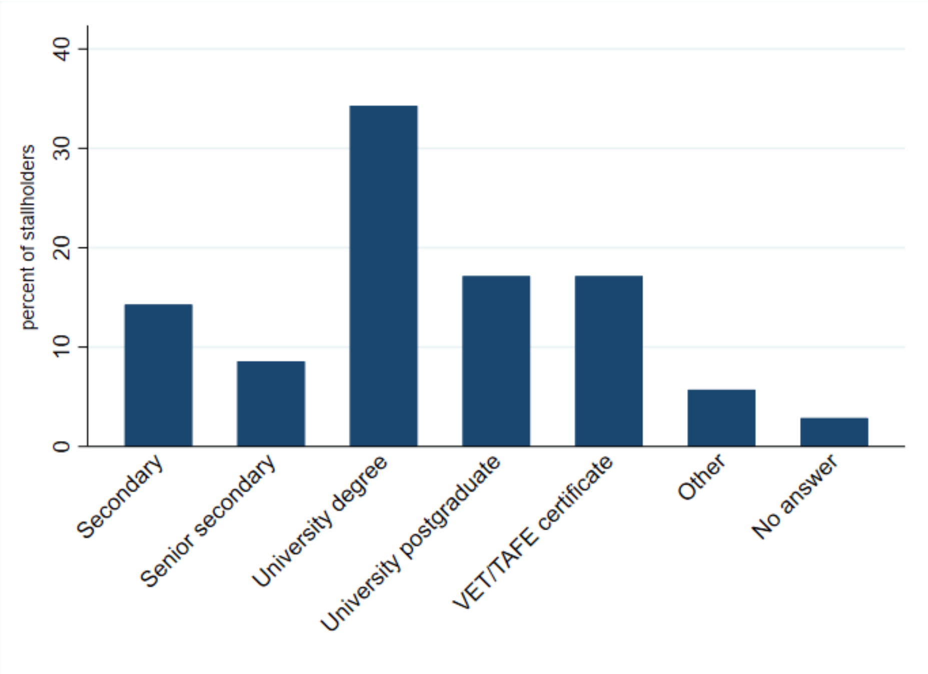


Figure 6. Stallholders education attainment.

In order to explore how the community of the market expanded overtime, upon its foundational stage, we asked stallholders 'how did you learn about Harvest Launceston?'. A majority (68%) declared that they learnt about the market through word-of-mouth, despite the extensive publicity, accolades and media coverage the market receives in an ongoing basis. Only 14% declared to have found about the market through the local press or advertisements, 18% were there since its foundation, most of them invited by the committee, 7% learnt about it by casually attending, and 4% learnt about the market online. This could be an indicator of the importance of trust in cultural communities. Similarly, it could be linked to principles of exclusion and inclusion through direct invitation, making the process exclusive to the committee's discretion.

(A) Stallholders' motivations to join the market

We observed stallholders' motivations to join the market. We asked what benefits they found in Harvest Launceston. The vast majority reported that Harvest Launceston 'provides a possibility to educate people about local food and produce' (89%) and that market participation 'brings profits to their business' (89%). Most agreed that the market 'is a great environment to connect with the local community around food', 'provides an alternative avenue to sell fresh, local, seasonal and nutritional food', and `is a good environment to build and grow a brand' (86%). This suggests that stallholders not only value the benefit of participating in the market for their business but also importance in the creation of community and culture around healthy and sustainable food. Moreover, they believed the market 'creates a culture of collaboration and mutual support amongst vendors' (83%).

Stallholders reported that Harvest Launceston 'is a reliable distribution channel for their business (71%), as they agreed that it 'provides a one-stop venue for people to buy fresh, local, seasonal and nutritional food' and 'promotes local agriculture' (66%). Over half of stallholders thought 'it is a low-risk environment to grow my business' (57%). Some stallholders added that the market `is a good place to trial new products', and that 'it reaches visiting tourists'.

We asked stallholders whether they took their business to additional markets to get a sense of their preferences and motivations; 43% attended other markets. Some stallholders indicated a state market (23%), other local markets in the city or surroundings (9%). Some also sold at festivals or shows (9%). For instance, Evandale and Exeter markets, although located in a radius of around 20km out of the city of Launceston, were considered in the vicinity (surrounding markets). Many mentioned attending Farmgate in Hobart.

Furthermore, when asked about what other distribution channels they use, stallholders indicated using supermarkets (11%). Some stallholders use other retail shops (37%), while a few have their own retail shop (14%). Some reported online sales (26%), and wholesale distribution (31%). A few reported to sell to bar, cafes and restaurants (20%) and some sell at festival, events or catering (17%). 9% of respondents reported to sell through cellar doors and bottle shops and 6% through other markets.

Amongst their reasons to join the Harvest Launceston community (87% response rate), 42% noted marketing or new costumer demographic as their main reason to join the market. Some (16.1%) aimed at developing new sales outlets or testing products (23%). Some respondents stated the risk-free environment the market provides (3%) with 23% indicating the good return on investment as a reason to attend. Some stallholders chose the market because Harvest Launceston provides a community of support and friendship (32%) and to promote local produce (16%). Interestingly, some stallholders reported to sell at Harvest Launceston market to invest in the consumer-producer relationship.

When asked about their favourite aspects of Harvest Launceston (84% response rate), half of respondents highlighted Harvest Launceston reliable customer base and interactions with costumers (55%), the quality of food (13%), the support by other stallholders and the market's management (13%), the opportunity to sell and promote their produce (13%) and the local feel (10%).

Stallholders were also asked about their dislikes about the market (80% response rate). Some respondents complained about the amenities, such as parking and toilets (16%), with a few (10%) complaining about issues related to the management and market policies. Some complained about the weather (23%). A minority mentioned extended opening hours (3%), distance from home (3%), fees (3%) and lack of exposure to other nationalities. Complaints on amenities reflected current pressures the market faces with its reduced area of operation and a perceived lack of support from the local council. The fact that some (20%) stallholders did not have anything to complain about could be considered as a reflection of their overall satisfaction.

Finally, stallholders where asked about the ways in which they believed the market could be improved (77% response rate). Again, 10% did not think any improvements were necessary, reflecting satisfaction with the quality of management of the market. Some (52%) demanded site improvements (more parking space, better amenities, new space), the inclusion of non-food or craft items (10%), extended trading hours (7%), more promotion of the market (7%), only local producers (3%), stronger stallholder representation on the board (3%), more organic producers (3%) and avoiding conflicting events (3%), especially the footy games. This last item validates our findings that more patrons seem to choose to attend the market when no other events are on.

(B) Stallholders' perceptions of the market

An exploration of stallholders' perceptions of the market revealed the following:

- All participant stallholders agreed that the market `offers a variety of produce, products and food and drinks';
- 97% agreed that 'produce in Harvest Launceston is of high quality';
- 97% agreed that 'farmers' markets contribute to availability of fresh and local food' and that 'farmers' markets contribute to the diversity of offer of fresh and local food';
- 94% agreed that 'Harvest Launceston offers opportunities for community engagement';
- 94% agreed that 'farmers' markets contribute to Tasmania's agri-tourism industry';
- 91% agreed that 'farmers' markets contribute to cultural diversity';
- 89% agreed that 'produce and food at Harvest Launceston are reasonably priced'.

With regards to farmers' markets role in bringing a community together, stallholders reported that:

- It `contributes to the local economy' and that it `promotes regional and local agriculture and supports local farmers' (94%);
- It 'provides a one-stop shop to access fresh, local, seasonal and nutritional food' (91%);
- Acts as an environment to learn about and connect through food' (86%);
- 'Adds to the livability of the city' (83%);
- 'Supports community, local groups and other initiatives' (80%);
- 'Encourages community wellbeing and improved health', 'revitalizes public spaces' (66%); and
- 'Supports its networks' (74%).

Respondents also highlighted that the market provides an opportunity for education about food provenance, and 'produce seasonality' (100%), as well as 'how produce is made' (89%) and 'the resources involved in food production' (71%). Others highlighted the 'community around food and sharing' (69%), and 'the tradition about produce' and 'recipes' (57%).

21% of respondents emphasised the diverse, inclusive and welcoming aspect of the market and its vibe. 14% highlighted its friendly aspect, and 7% its community, collegial and supportive aspects. Moreover, 7% of respondents described the market as 'amazing' and there were no negative remarks which indicates satisfaction with management and communications. Stallholder participants expressed overall sadness over the idea of the market folding, indicating a potential loss to the community (22%) and their businesses (19%).

Stallholders provided little additional commentary about the role of food in building and wellbeing. Only 4 respondents emphasised the role of the market in educating the local community on fresh and local food consumption for health and wellbeing, the need to connect consumers with food sources and farms, as well as working towards a more sustainable consumption future.

CONCLUSIONS

In this study we explored the role of food in in a community building setting through a longitudinal case study of Harvest Launceston farmers' market. Following a mixed-methods approach, combining quantitative and qualitative data through a series of on-site surveys to patrons and stallholders the analysis demonstrates the key role of the market, beyond a point of sale, in community building and supporting cultural value, as well as promoting well-being.

The data analysis follows overall Australian consumer trends supporting local fresh food industries and communities, based on healthier choices and respect for the environment. In addition, we observed many intangible benefits and added value the market brings to consumers, producers and the local community at large. The report provides a holistic view of the value of the market from a supply and demand perspective, the local community as well as from an agri-tourism perspective.

The typical harvest patron is younger, more educated and manages higher household incomes than the typical local resident. For most respondents Harvest Launceston was indeed regarded as a social weekend activity, beyond a mere shopping outing, and a chance to socialize and meet with community members. Market attendees indeed overwhelmingly acknowledged and appreciated the community feel generated from their interactions with local farmers in the market. The stallholder cohort was made of Tasmanian businesses mostly located and well established in the local vicinity, presenting mostly small company structures in which traditional local business make up the bones of the market and are its driving force.

A significant 18% of surveyed market attendants were visitors mainly from interstate, including international tourists. Insights gained from their motivations and perceptions of the market showed that Harvest Launceston is considered a tourist cultural attraction where visitors learn about the local produce and traditions, as well as to purchase and consume high-end produce and food.

The farmers' market offers a great platform for local farmers and businesses to offer their products and grow. It also offers a common place for the community to access fresh and local produce, support local farmers and businesses and enact sustainable practices. Market attendees are willing to pay above competitive prices for these features. Importantly, it clearly becomes a space for community to meet and interact around food purchase and consumption and learn from each other. It provides a space for leisure and socialising, and in that context it becomes a touristic attraction. Although not analysed specifically in this work, all these features have important implications for community health, wellbeing and development. However, these social returns currently mainly benefit higher-income individuals in the community given the typical characteristics of market attendees, and would be more beneficial to extend them to all the local community

A note on the present COVID-19 pandemic effects on our food systems

The COVID-19 pandemic has brought to the spotlight the many crises our food systems are currently experiencing and has emphasised the potential consequences that a lack of access to fresh, quality and organic food has on people's health and wellbeing.[10] Farmers' markets support a more sustainable production of food. Farmers' markets educate consumers on seasonal and optimal nutrition, regenerative agricultural practices, healthy diets, waste management and human connection through food. From an economic perspective, farmers' markets support small to medium local producers and increase diversity. Our food systems are the founding pillars of health and wellbeing in our communities.

In addition, food is a driver of community building and has an undeniable cultural significance. Food brings communities together. The social distancing regulations imposed by governments due to the

[10] For example, in Australia, were most food production responds to the requirements and price wars of a long established supermarket duopoly, 40% of fresh food production is currently wasted.

COVID-19 health crisis are restricting social interactions within the community. Many markets around the country, including Harvest Launceston, had to close temporarily following governments' regulation. The importance of community interaction and support has been made more evident. While the physical market Harvest Launceston was closed for a few weeks during the COVID-19 pandemic, coinciding with health advice towards isolation, the organisers of the market responded by taking it online firstly to a deliver to the door model and then by adding a click and collect market. The organisers reported approximately 300 orders a week that supported stallholders/producers and maintained supply for fresh local produce in the community. At the time of writing of this report, the physical market up and running again. The market, indeed, never completely closed. Despite the ongoing HR and financial costs of running an online version of the market, the management successfully continued the fresh food and produce sales function, that pivoted to www.harvestmarketonline.org.au. The market management has stated that they are exploring the possibility to continue to deliver fresh produce to those in the community who are unable to attend the market in person due to illness or disability, utilising the learnings from the online format experience.

The results of this survey suggest that farmers' markets engage with a community of like-minded farmers, supported by a loyal customer-base and that, together, could act as a political actor or lobby advocating for alternative understandings of sustainable local and regional development through sustainable food systems that balance economic, social and environmental aspects.

The social, economic, and wellbeing benefits of farmers' markets need to be inclusive and extend to all the community. Arguably those members of the community with lower education and poorer health (often associated with lower income) would benefit the most. With the appropriate government policies and subsidies, we believe that farmers' markets could assist in the provision of fresh and highly nutritional food, as well as food education, to lower socio-economic sections of our urban and regional societies.

REFERENCES

De Saussure, F. (2011). *Course in general linguistics*. Columbia University Press.

Fillis, I., B. Lee, and I. Fraser (2015). Measuring the cultural value of the royal Scottish academy new contemporaries' exhibition as a platform for emerging artists. *Cultural Trends* 24 (3), 245–255.

Glaser, B. (2017). *Discovery of grounded theory: Strategies for qualitative research*. Routledge.

Hinrichs, C. C. (2000). Embeddedness and local food systems: Notes on two types of direct agricultural market. *Journal of Rural Studies* 16 (3), 295–303.

Miles, M. B. and A. M. Huberman (1994). *Qualitative Data Analysis: An Expanded Sourcebook*. Thousand Oaks, CA: Sage Publications, Inc.

Schwartz, S. H. (2006). A theory of cultural value orientations: Explication and applications. *Comparative sociology* 5 (2), 137–182.

Yanotti, M. B., & Ripoll Gonzalez, L. (2018) Community, culture and value: An exploration of Harvest Launceston farmers' market. Industry Report. University of Tasmania.

Yin, R. K. (2003). *Case Study Research: Design and Methods, Applied Social Research Methods Series*. Thousand Oaks, CA: Sage Publications, Inc.

This study is a partnership between the Tasmanian School of Business and Economics, University of Tasmania and the Griffith Centre for Social and Cultural Research, Griffith University.

University of Tasmania

Launceston

Tasmania 7250

Australia

Published June 2020

ISBN Print 978-1-922352-29-3
ISBN Electronic: 978-1-922352-30-9

CONTACT:

Dr Maria Belen Yanotti, University of Tasmania
Maria.Yanotti@utas.edu.au

Dr Laura Ripoll Gonzalez, Griffith University, Queensland
l.ripollgonzalez@griffith.edu.au

www.utas.edu.au